

Activity Guide –

AR350: Maintaining Customers

State of Kansas

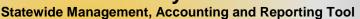




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Activity 1 - Demonstration: Entering a Customer

Scenario

In this scenario, you are a **Customer Creator**. Your supervisor has just informed you of a new customer with whom your agency is doing business. She has provided you with a document containing all the required fields for entering the customer and asked that you set the customer up for dunning. Navigate to the **General Information** page and add a new customer.

Menu Path

Customers → Customer Information → General Information → Add a New Value

UPK Procedure

Entering Customer Information

Job Aid

Not Applicable

Instructions

Watch your instructor as he/she demonstrates how to enter a customer in SMART. Do NOT perform this exercise along with your instructor.

<u> </u>
n: Add a New Value
17300
NEXT
ral Info
OTHER
[Instructor Name]
Leave blank <populates< th=""></populates<>
automatically>
USD
CRRNT
Checkbox selected
KANSAS
Checkbox selected
Main Office
Checkbox selected
Checkbox selected
Checkbox selected
108 N Kansas Avenue





Field	Value	
City	Topeka	
State	KS	
Postal	66603	
Bill To Options		
Credit Analyst	001	
Collector	3RDPARTY	
AR Specialist	17300	
General Info > Correspondence Options		
Dunning ID	KSDUN	
Statement ID	STATE	





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Activity 2 - Exercise: Entering a Customer

Scenario

In this scenario, you are a **Customer Creator**. Your supervisor has just informed you of a new customer with whom your agency is doing business. She has provided you with a document containing all the required fields for entering the customer and asked that you set the customer up for dunning. Navigate to the **General Information** page and add the new customer.

Menu Path

Customers → Customer Information → General Information → Add a New Value

UPK Procedure

Entering Customer Information

Job Aid

Not Applicable

Instructions

Use the appropriate steps from the previous Instructor led walkthrough(s) to complete the exercise scenario in SMART. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you. If you need assistance as you complete this exercise, refer to the UPK. If there is not a UPK, then refer to the Instructor for guidance.

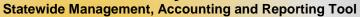
Nequired Data		
Field	Value	
General Informa	ation: Add a New Value	
SetID	17300	
Customer ID	NEXT	
Ge	eneral Info	
Customer Status	Active	
Date Added	<enter date="" today's=""></enter>	
Since	<enter date="" today's=""></enter>	
Туре	OTHER	
Name 1	[your name] Office Supplies	
Short Name	<leave blank=""> (populates</leave>	
	automatically)	
Currency Code	USD	
Rate Type	CRRNT	
Bill To Customer	Checkbox selected	
Team Code	KANSAS	





Field	Value	
Default	Checkbox selected	
Location	1	
Description	Main Office	
Bill To	Checkbox selected	
Primary (for Bill To)	Checkbox selected	
Effective Date	<keep default=""></keep>	
Address 1	108 N Kansas Avenue	
Address 2	Room [your User ID number]	
City	Topeka	
State	KS	
Postal	66603	
Bill To Options		
Credit Analyst	001	
Collector	3RDPARTY	
AR Specialist	17300	
Billing Specialist	GLH	
General Info → Correspondence Options		
Dunning ID	KSDUN	
Statement ID	STATE	







Activity 3 - Walkthrough: Copying an Existing Customer

Scenario

In this scenario, you are a **Customer Creator** that needs to add a new customer. The customer has the same general information, roles, and addresses as an existing customer, Kroner Phone Service (customer ID - 00000000000101). Use the **Copy from Customer** link to copy Kroner Phone Service's customer information into the new customer's profile. Then, update the address information specified below and save the new customer.

Menu Path

Customers → Customer Information → General Information → Add a New Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to copy an existing customer in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Required Data		
Field	Value	
General Information: Add a New Value		
SetID	17300	
Customer ID	NEXT	
Gene	ral Info	
Name 1	[your name] Phone Services	
Short Name	Leave blank <populates< td=""></populates<>	
	automatically>	
Click Copy From Customer Link		
Copy Customer		
Customer ID	See user specific data	
General Information	Checkbox selected	
Addresses	Checkbox selected	
Bill To Options	Checkbox selected	
Bill To Customers	Checkbox selected	
Support Teams	Checkbox selected	
Click the OK button		





	Field	Value
General Info: Address Details		
Address 2		Suite [your User ID number]





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Activity 4 - Demonstration: Updating Customer Types and General Customer Information

Scenario

In this simulation, you are a **Customer Creator**. One of your peers has notified you that when Sam's Specialties was created, the customer type was accidentally set to "FEDGOV" for Federal Government. The customer type should be set to "Other".

You also received an email from the customer contact that they have just moved their main office to a new location in downtown Topeka. Use the **General Info** page to update the customer type and add a new address location for the customer of 756 Kansas Avenue, Topeka, KS 66612.

Menu Path

Customer → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Watch your instructor as he/she demonstrates how to update customer type and general information. Do NOT perform this exercise along with your instructor.

Field	Value	
General Information: F	ind an Existing Value	
SetID	17300	
Customer ID	See user specific data	
General Info		
Туре	OTHER	
* Click the + button to add new Address Details		
Address 1	756 Kansas Avenue	
City	Topeka	
Postal	66612	



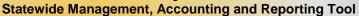


Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	00000000000303
Backup 1	Customer ID	00000000000304
Backup 2	Customer ID	000000000000305

User	Field	Value
Instructor 1	Customer ID	00000000000306
Backup 1	Customer ID	000000000000307
Backup 2	Customer ID	00000000000308







Activity 5 - Walkthrough: Correspondence Customer Options

Scenario

In this scenario, you are an **AR Agency Administrator**. You need to set up correspondence defaults and options for your customer, including changing bank account information.

Menu Path

Customers → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how add customer correspondence options in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Required Data

Roquirou Butu		
Field	Value	
General Information: Find an Existing Value		
SetID	17300	
Customer ID	See User Specific Data	
General Info Links: Correspondence Options		
* Click the + button to add new Correspondence Options		
Effective Date	<today's date=""></today's>	
Correspondence Options: Remit To		
Bank	Remit	
Account	173B	

olacorcom i cool opcomo bata		
User	Field	Value
Instructor 1	Customer ID	00000000000035
Instructor 2	Customer ID	00000000000036
Instructor 3	Customer ID	0000000000037
User 1	Customer ID	0000000000038
User 2	Customer ID	00000000000039





User	Field	Value
User 3	Customer ID	00000000000040
User 4	Customer ID	00000000000041
User 5	Customer ID	00000000000042
User 6	Customer ID	00000000000043
User 7	Customer ID	00000000000044
User 8	Customer ID	00000000000045
User 9	Customer ID	00000000000046
User 10	Customer ID	00000000000047
User 11	Customer ID	00000000000048
User 12	Customer ID	00000000000049
User 13	Customer ID	00000000000050
User 14	Customer ID	00000000000051
User 15	Customer ID	00000000000052
User 16	Customer ID	00000000000053
User 17	Customer ID	00000000000054
User 18	Customer ID	00000000000055
User 19	Customer ID	00000000000056
User 20	Customer ID	00000000000057

User	Field	Value
Instructor 1	Customer ID	00000000000058
Instructor 2	Customer ID	00000000000059
Instructor 3	Customer ID	000000000000000
User 1	Customer ID	00000000000061
User 2	Customer ID	00000000000062
User 3	Customer ID	00000000000063
User 4	Customer ID	00000000000064
User 5	Customer ID	00000000000065
User 6	Customer ID	00000000000066
User 7	Customer ID	00000000000067
User 8	Customer ID	00000000000068
User 9	Customer ID	00000000000069
User 10	Customer ID	00000000000070
User 11	Customer ID	00000000000071
User 12	Customer ID	00000000000072
User 13	Customer ID	00000000000073
User 14	Customer ID	00000000000074





User	Field	Value
User 15	Customer ID	00000000000075
User 16	Customer ID	00000000000076
User 17	Customer ID	00000000000077
User 18	Customer ID	00000000000078
User 19	Customer ID	00000000000079
User 20	Customer ID	08000000000000000





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Activity 6 - Walkthrough: Contacts

Scenario

In this scenario, you will set up Contact information for a customer.

Menu Path

Customers → Contact Information → Add a New Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how add customer correspondence options in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Field	Value	
Customers → Contact Information → Add a New Value		
Name	your name	
Title	Purchasing Manager	
Email ID	smarttraining@da.ks.gov	
Preferred Communication	Email only	
Contact Pho	ne and Type	
Phone Type	BUSN	
Phone Number	785/222-2222	
Extension	2605	
Contact Customer Information		
Customer Set ID	17300	
Customer Number	User specific data	
Location	1	
Save		
Search for Contact information for a customer		
Customers → Contact Information → Find an Existing Value		
SetID	17300	
Customer Number	User specific data	





Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	00000000000196
Instructor 2	Customer ID	00000000000197
Instructor 3	Customer ID	00000000000198
User 1	Customer ID	00000000000199
User 2	Customer ID	00000000000200
User 3	Customer ID	000000000000201
User 4	Customer ID	000000000000202
User 5	Customer ID	00000000000203
User 6	Customer ID	00000000000204
User 7	Customer ID	000000000000205
User 8	Customer ID	000000000000206
User 9	Customer ID	00000000000207
User 10	Customer ID	00000000000208
User 11	Customer ID	00000000000209
User 12	Customer ID	00000000000210
User 13	Customer ID	00000000000211
User 14	Customer ID	00000000000212
User 15	Customer ID	00000000000213
User 16	Customer ID	00000000000214
User 17	Customer ID	00000000000215
User 18	Customer ID	00000000000216
User 19	Customer ID	00000000000217
User 20	Customer ID	00000000000218

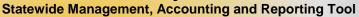
Glacor Com 2 Coor opcomo Bata		
User	Field	Value
Instructor 1	Customer ID	00000000000219
Instructor 2	Customer ID	00000000000220
Instructor 3	Customer ID	00000000000221
User 1	Customer ID	00000000000222
User 2	Customer ID	00000000000223
User 3	Customer ID	00000000000224
User 4	Customer ID	00000000000225
User 5	Customer ID	00000000000226
User 6	Customer ID	00000000000227
User 7	Customer ID	00000000000228
User 8	Customer ID	00000000000229
User 9	Customer ID	00000000000230





User	Field	Value
User 10	Customer ID	00000000000231
User 11	Customer ID	00000000000232
User 12	Customer ID	00000000000233
User 13	Customer ID	00000000000234
User 14	Customer ID	00000000000235
User 15	Customer ID	00000000000236
User 16	Customer ID	00000000000237
User 17	Customer ID	00000000000238
User 18	Customer ID	00000000000239
User 19	Customer ID	00000000000240
User 20	Customer ID	00000000000241







Activity 7 - Walkthrough: Attachments

Scenario

In this scenario, you are an **Agency AR Administrator**. You have received several emails from one of your customers and have decided that they should be attached to the customer's record. Rather than retyping the emails as a customer conversation, the files have been combined into a single Word document that you need to attach.

Menu Path

Customers → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to add attachments for a customer in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Required Data

Field	Value	
General Information: Find an Existing Value		
SetID 17300		
Customer ID	See User Specific Data	
General Info Links: Attachments		
Attachment Information Section Click the Add button, click Browse		
Attached File	CustomerEmails.txt	

elacorcom r coor opcomo bata		
User	Field	Value
Instructor 1	Customer ID	00000000000101
Instructor 2	Customer ID	00000000000102
Instructor 3	Customer ID	00000000000103
User 1	Customer ID	00000000000104
User 2	Customer ID	00000000000105
User 3	Customer ID	00000000000106
User 4	Customer ID	00000000000107





User	Field	Value
User 5	Customer ID	00000000000108
User 6	Customer ID	00000000000109
User 7	Customer ID	00000000000110
User 8	Customer ID	00000000000111
User 9	Customer ID	00000000000112
User 10	Customer ID	00000000000113
User 11	Customer ID	00000000000114
User 12	Customer ID	00000000000115
User 13	Customer ID	00000000000116
User 14	Customer ID	00000000000117
User 15	Customer ID	00000000000118
User 16	Customer ID	00000000000119
User 17	Customer ID	00000000000120
User 18	Customer ID	00000000000121
User 19	Customer ID	00000000000122
User 20	Customer ID	00000000000123

User	Field	Value
Instructor 1	Customer ID	00000000000124
Instructor 2	Customer ID	00000000000125
Instructor 3	Customer ID	00000000000126
User 1	Customer ID	00000000000127
User 2	Customer ID	00000000000128
User 3	Customer ID	00000000000129
User 4	Customer ID	00000000000130
User 5	Customer ID	00000000000131
User 6	Customer ID	00000000000132
User 7	Customer ID	00000000000133
User 8	Customer ID	00000000000134
User 9	Customer ID	00000000000135
User 10	Customer ID	00000000000136
User 11	Customer ID	00000000000137
User 12	Customer ID	00000000000138
User 13	Customer ID	00000000000139
User 14	Customer ID	00000000000140
User 15	Customer ID	00000000000141
User 16	Customer ID	00000000000142





User	Field	Value
User 17	Customer ID	00000000000143
User 18	Customer ID	00000000000144
User 19	Customer ID	00000000000145
User 20	Customer ID	00000000000146





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Activity 7 - Walkthrough: Notes

Scenario

In this scenario, you are a **Billing Administrator** that needs to assign a standard note to thank your customer for their business. This note is used on all invoices sent to the customer. You also need to add a custom note that includes special billing terms arranged with your primary contact at the customer. Add both notes to the customer information on the **Notes** page.

Menu Path

Customers → Customer Information → General Information → Find an Existing Value

UPK Procedure

Not Applicable

Job Aid

Not Applicable

Instructions

Follow along with your instructor as he/she demonstrates how to add notes to a customer in SMART. Perform each step along with the instructor using the values assigned to your training number. For fields in the Required Data table that require "user specific data," be sure to use ONLY the user number that your instructor has assigned to you.

Field	Value			
General Information: Find an Existing Value				
SetID	17300			
Customer ID	See User Specific Data			
General Info Links: Notes				
Customer Note 1				
Use Predefined Standard Note	Checkbox selected			
Note	THANK YOU			
Customer Note 2				
Use Predefined Standard Note	Checkbox not selected			
Note Type	CUSTNOTE			
Note Text	As agreed, the payment of this invoice			
	is due 30 days upon receipt.			
Invoice	Checkbox selected			





Classroom 1 - User Specific Data

User	Field	Value
Instructor 1	Customer ID	00000000000148
Instructor 2	Customer ID	00000000000149
Instructor 3	Customer ID	00000000000150
User 1	Customer ID	00000000000151
User 2	Customer ID	00000000000152
User 3	Customer ID	00000000000153
User 4	Customer ID	00000000000154
User 5	Customer ID	00000000000155
User 6	Customer ID	00000000000156
User 7	Customer ID	00000000000157
User 8	Customer ID	00000000000158
User 9	Customer ID	00000000000159
User 10	Customer ID	00000000000160
User 11	Customer ID	00000000000161
User 12	Customer ID	00000000000162
User 13	Customer ID	00000000000163
User 14	Customer ID	00000000000164
User 15	Customer ID	00000000000165
User 16	Customer ID	00000000000166
User 17	Customer ID	00000000000167
User 18	Customer ID	00000000000168
User 19	Customer ID	00000000000169
User 20	Customer ID	00000000000170

User	Field	Value
Instructor 1	Customer ID	00000000000171
Instructor 2	Customer ID	00000000000172
Instructor 3	Customer ID	00000000000173
User 1	Customer ID	00000000000174
User 2	Customer ID	00000000000175
User 3	Customer ID	00000000000176
User 4	Customer ID	00000000000177
User 5	Customer ID	00000000000178
User 6	Customer ID	00000000000179
User 7	Customer ID	00000000000180
User 8	Customer ID	00000000000181





User	Field	Value
User 9	Customer ID	00000000000182
User 10	Customer ID	00000000000183
User 11	Customer ID	00000000000184
User 12	Customer ID	00000000000185
User 13	Customer ID	00000000000186
User 14	Customer ID	00000000000187
User 15	Customer ID	00000000000188
User 16	Customer ID	00000000000189
User 17	Customer ID	00000000000190
User 18	Customer ID	00000000000191
User 19	Customer ID	00000000000192
User 20	Customer ID	00000000000193